LIGHTHOUSE
Financial Advisors, Inc.
INVESTMENT ADVISORY ARM OF
LIGHTHOUSE WEALTH MANAGEMENT

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INFORMATION REQUEST FORM

To create a complete and thorough picture of your current and future financial situation, we will need the following information from you. This material will be treated confidentially and returned to you as soon as the planning process is completed, or earlier if requested. If you do not have every item on this list, just bring what you can to our first meeting.

- Most recent statements from Investment Companies, Brokers and Banks (including Checking & Saving accounts)
- Most recent Pension / Retirement Plan statements from employer(s)
- Most recent Social Security statements. You can obtain online: http://ssa.gov/mystatement/
- Budget of personal and living expenses (see attached)
- Mortgage and other loan statements
- Most recent payroll stubs
- Federal and State Income Tax Returns for previous year
- Life and Disability Insurance Policies and latest premium notices
- Estate Planning Documents (Wills, POA's, Medical Directives, Trusts, etc.)
- Most Recent statements of minor children's assets
- Any other relevant documentation

Should you have any questions, please do not hesitate to contact our office at (301) 865-9740.